Creating a Finished Plain Talk Document – Step by Step

Writing is only a small part of creating a Plain Talk document.

Most of the work involves learning about your customer and the business needs of your agency's program.

Whether you are revising a form letter, a form, or an information sheet, here are the steps you'll need to create your "Plain Talk" document.

Step 1 Learn about your agency program's business needs

Get clear about what the program needs the document to accomplish

Whether you are revising an old document or creating a new one, first interview the program staff -- and manager, if necessary. Find out what they want the document to accomplish. They should have a business goal for it. For example, they may want:

- To get more customers to register on time.
- To increase revenue
- To reduce phone calls to the agency.
- To make sure customers understand their legal rights.

After you've talked about goals, ask them if they think the current document is working. If not, why?

Decide what review and sign-off process will work for the program

Find out who in the program must review the document and who will give it the final sign-off. Set up a review system everyone is comfortable with.

Find out if there are legal constraints you must know about

Are there legal requirements you need to know about before rewriting. In some cases, you may be required to cite RCWs or refer to specific cases in law.

Work out a project management tracking sheet that outlines your schedule for researching, writing, revising, testing and finalizing – and who will be involved.

Step 2 Learn about your customers and their needs

Find out who usually reads the document you are working on. Learn as much as you can about the reader's likely tasks and responsibilities. Talk to frontline staff about the types of questions and problems they have. Or interview typical customers.

Before you can decide what's in your document, you must find out:

- Why they will be reading it.
- What task do you expect them to do after reading what you write.
- What confused them about the original document.

Later, seriously consider putting your document through a **usability test.** This way, you'll be able to find out if the customer can correctly perform the task you are asking them to do in the document. The program should be able to tell you what it *really* wants its customers to do.

Step 3 Create a new content outline

Before you plunge the reader into new information, give the reader a way to answer the question, "Does this information apply to me?"

Most people scan documents before reading them. Make it easy for them to tell if the message is intended for them and make sure that clue is at the top.

Then, create a new outline showing how you want to organize the main points and subpoints, and how they relate to each other.

You might organize by…

Chronology	The order in which things: • Need to be done. • Are experienced by the reader.
Majority	• First, the universal or most common items, or the things that apply to the greatest

	number of readers, first. • Last, the least common items or the things that apply to the fewest number of readers.
Importance	• First, the things with the most important or dangerous consequences first. • Last, the things with the slightest or least important consequences.

Note: Try including the program's work group in this outlining process. You will get invaluable advice and give them a sense of ownership in the document.

Step 4 Write a first draft.

Flesh out the points.

Write what needs to be said about each point in your outline. Put things in order if you can, or simply capture them so you can reorganize them later.

State your points as clearly and simply as you can, but for now keep your focus on giving information that's accurate and complete.

Use placeholders.

Is information missing? Do you have questions you cannot get answered immediately? Put something in your document to mark what is needed.

Identify placeholder text by one or more of the following:

- Simply label it "Placeholder text"
- Use a different font, a different color, a different size, bracket it with special characters **>>like this<<** – anything to show clearly that it's different from the other text.
- Put a box around it to show clear boundaries for what's placeholder text and what's actual draft text.

Format the document.

Try to set up your draft as if it were a finished document. It will help reviewers pay attention to the message, instead of being distracted by how it 'doesn't look right.'

This also helps you see how your organization will work for the finished document, so you can make any adjustments needed.

NOTE: If you are writing a high-volume document that must be programmed, find out how much room you will have by studying the template, the number of letters per line and the number of lines available.

Step 5 Check the Plain Talk Guidelines

Governor Gregoire's Executive Order 05-03 is very specific that a Plain Talk document should have:

- **Clear language that is commonly used by the intended audience.**
- **Only the information needed by the recipient, presented in a logical sequence.**
- **Short sentences:** Are your sentences short, with only one idea for each? Have you avoided using constructions like "for purposes of" by saying "to" instead, and chosen simpler words like "get" instead of "obtain" and "help" instead of "assistance"?
- **Sentences, written in the active voice, that make it clear who is responsible for what**. This means making sure who is responsible for every action, and using verbs like "maintaining" instead of "for maintenance of." Also, do you speak directly to the reader by saying "You"? Do you tell the reader what to do or not do in unmistakable terms?
- **Layout and design that help the reader understand the meaning on the first try.** This includes adequate white space, bulleted lists, helpful headings and other proven techniques.

Step 6 Review your document

Read your draft slowly and thoroughly.

If possible, set the draft aside for a day or two, or even a few hours, so you come to it with fresh eyes. Otherwise, you may only see what it's 'supposed' to say instead of what it really says.

Confirm that all the content you are sure of is included, and in the correct places.

Be sure you have put in placeholders and marked them clearly.

Look again at formatting if you haven't already. Make it as close to the final form as possible.

Step 7 Ask for feedback

In Step 1, you established who will need to review and give final approval to the document. Now it's time to seek their feedback. Give them a definite deadline, or schedule a review meeting.

What's incorrect?

By asking reviewers what's incorrect, you let them know that you expect – even want – them to find errors. Reviewers know you won't be defensive about what they say, and that their comments and insights are welcome.

This also helps you to show that the accuracy of the information doesn't rely on your judgment alone – others who are knowledgeable have signed off on it as well. Being part of the review process helps others feel a sense of responsibility and ownership for the content in the final document.

What's missing?

Asking reviewers to tell you what's missing – even when you think the content is complete – is a good idea because it gives you the benefit of others who may have deeper knowledge of or a different perspective on the topic.

You may think the content is complete, but be mistaken. Asking reviewers is a chance to catch omissions and correct them before the document is final.

What's unclear?

Like asking what's incorrect, asking what's unclear opens the door for reviewers to give honest and specific feedback. We all know what we mean when we write something, but it doesn't always come through that way.

And, what seems clear to you may not be clear to others. Now is your chance to express ideas as clearly as possible for the greatest number of readers.

What can be cut?

The fewer your words, the more you increase the likelihood that they will be read.

Step 8	**Test for the document's "usability" with customers**

A document is not final until know your customer can understand and ***use*** it.

Many times, government letters and forms can seem perfectly clear to the people working in the programs. But they still can be confusing to customers from the outside.

1. **Define the reader**: Decide who your target customers are and what their characteristics are.
2. **Figure out what your goals are:** Decide what you most want your customer to understand in your document
3. **Create a simple usability test**: Usability tests allow us to see if typical customers ("users") can actually follow the instructions or understand the basic message in the document.
4. **Collect your data** Most usability tests reveal simple changes you can make to increase comprehension.

It’s never easy to decide when to conduct your testing. You don’t want to test your document too soon, before you really know what it must contain. But you don’t want to wait too late either, when you’re almost out of time.

For more on how to conduct a simple usability test, go to “Tools and Resources.”

Step 9 Revise, using your feedback from programs and usability tests

Present your usability data

Your program will want to know what you discovered and what your recommendations are

Compile your feedback

If you have time, compile feedback from customers, staff members and attorneys (if necessary) onto a single copy of the reviewed document. This lets you see:

- Where several reviewers commented on the same thing
- Whether one or more reviewer’s comments conflict with those of another or others

Resolve conflicting comments from your programs

Not all reviewers will agree about how the draft needs to be different. If reviewers give conflicting comments, it will be your job to help them reach a consensus.

Assess all feedback

Once you have a clear body of feedback, assess each comment. It will be up to you to decide which ones to act on and which ones to disregard.

When you disregard a piece of feedback, make a note about why. Then mark it clearly somehow so you’ll know not to use it when you’re revising.

Change your draft.

Now is the time to revise your draft to reflect the useful and important feedback you received.

Use “track changes” on your computer to track the changes you’ve made since the last draft. Use “insert comment” to let everyone know how you made the decision, if necessary.

Freeze the draft.

No document is ever perfect. But documents need to be published so people can use them. This means you have to “freeze” the document and make no more content changes unless a critical issue emerges.

The “freeze” date is driven by the publishing or project deadline, and is the only way to allow the time needed for final passes through the document, such as for copyediting, formatting, and proofreading, and to produce the document in published form.

Be firm about the freeze date. Make sure reviewers know that you’ll keep input and comments received after that date, but that those changes WON’T be included in the upcoming release. A future release will include them.

Step 10 Publish!

If you're responsible for publishing:

After you've frozen the document and made the final passes through it, you're ready to publish and distribute it. The time it takes to do these two things have to be considered in planning the document's overall time line.

For printed documents, this means you must consider:

- Scheduling time with a print shop, if you're using one.
- Production time at the printer's, or time to print and assemble the document in-house.
- Distribution time for the printed copies to reach the people who will use them.

For electronic documents, this means you need to consider

- Scheduling time with the appropriate webmaster or IT. person
- Who puts the document into the correct formats, such as HTML for web page display and .pdf format for downloading, and time to do that
- Testing the document, such confirming that links work correctly, before it is published "live."

If someone else is responsible for publishing:

Wrap up your final work on the document:

- Hand off the final electronic files to the correct person, along with a printed copy if needed. (Be sure to keep a copy for yourself.)

Send out an email to let interested people know the document is now out of your hands, and who to contact (you or someone else) if they have issues or questions.